

# NAME

Address • Miami, Florida • PHONE • EMAIL

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## PURPOSE STATEMENT:

Seeking an opportunity in finance where an extensive knowledge of asset valuation and financial statements analysis can be applied to real world investments. As a CFA candidate I have been primarily focusing on asset valuation and the interpretation of financial statements.

## WORK EXPERIENCE:

### Real Estate Investment Company

Miami, FL

#### Accounts Receivable

May 2014 - Present

- Completely overhauled the invoicing process in QuickBooks for construction work on bank-owned properties. Implemented an organized and efficient system, ultimately billing the bank's asset manager for over \$300,000 in construction and rehab costs
- Assist in managing a portfolio of 35 residential properties. Daily tasks include rent collection, bank reconciliation, responding to violation notices and tenant maintenance issues
- Facilitated the offshoring of utility bills processing to the company's support office in Colombia. Personally trained and supervised the new team during the transition period

### THE RETIREMENT GROUP

San Diego, CA

#### Analyst Intern

June 2013 – August 2013

- Utilized proprietary software to generate personalized retirement plans for clients, identifying their optimal retirement and short-fall date
- Developed PowerPoint presentations detailing pension plan eligibility and company-specific pension calculations to be delivered to clients at seminars across the country
- Spearheaded a company-wide initiative to increase operational efficiency and client satisfaction

### TOURO COLLEGE

New York, NY

#### Business School Tutor

September 2011 – January 2013

- Provided assistance to struggling students in Finance Principles and Corporate Finance courses
- Conveyed information in a clear and concise manner to enhance the student's grasp of complicated concepts in preparation for exams

## EDUCATION:

### TOURO COLLEGE

New York, NY

- Bachelor of Science in Mathematics / Minor in Finance
- G.P.A. - 3.90
- Dean's List and recipient of Touro academic scholarship
- Passed CFA Level 2 Exam
- President, Investment Club
  - Arranged and moderated weekly discussions focusing on current financial news and interesting investment opportunities
  - Oversaw team of students in constructing and actively managing a diversified stock portfolio based on securities research and the implementation of strategic asset allocation

January 2013

**SKILLS:** Microsoft Office, YARDI Voyager, QuickBooks, Spanish and Hebrew